



Bitfocus



**SCC Technical Administrator (TA)/Agency Lead Meeting
Thursday, December 7th, 2023**



Getting to Know You!

If you had to choose a song to play every time you entered a room, what would it be?

Meeting Objectives

UPDATES

- CoC Updates
- UPLIFT Updates
- HMIS Newsletter

IN THE KNOW

- LSA – DQ Outreach
- SCC HMIS Quarterly Compliance Checklist – *Process Change*
- Coordinated Entry (CE) – Assessments Missing Referrals to the CQ – *Process Change*
- Using DocuSign

MEMOS

- NEW MyConnectSV Feature
- Holiday Schedule
- Annual Confidential Client Consent Training – Updates
- Next Month's Meeting

UPDATES



CoC UPDATES

COORDINATED ENTRY SYSTEM (CES)

Implementation Committee has developed questions for the new assessment tool, preparing for beta testing with a pilot group of assessors across the county

DOMESTIC VIOLENCE (DV) AGENCIES

DV-serving agencies are planning to meet quarterly to better coordinate efforts and advocacy between each other and the broader CoC

COC BOARD UPDATES

The December CoC Board meeting will be moved to January - Date **TBD**

Omar Passons is now the CoC Board appointee for the City of San Jose

NEW OSH CoC LEAD

Laura Urteaga-Fuentes at laura.urteagafuentes@hhs.sccgov.org

Laura brings a wealth of CoC experience from her work in two communities in Michigan

UPCOMING EVENTS *December 2023*

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1
4	5	6	7 <u>10am HMIS Clarity Office Hours</u> <u>2pm HMIS TA/Agency Lead Meeting</u>	8
11 <u>2pm SCC HMIS Looker Office Hours</u>	12 <u>10am Data Think Tank</u>	13 <u>9am VI-SPDAt In-Person Training</u> <u>9:30am Service Providers Network Meeting</u>	14	15
18	19	20 <u>10am SCC TA Office Hours</u>	21 <u>10am HMIS Clarity Office Hours</u>	22
25 Bitfocus Holiday & SCC Holiday 	26 Bitfocus Holiday 	27 Bitfocus Holiday	28 <u>3pm Rapid Rehousing & Employment Initiatives Meeting</u> Bitfocus Holiday	29 Bitfocus Holiday 

UPLIFT UPDATES

UPLIFT Quarter 3, January-March 2024 Upcoming

- First day to request Q3 passes: 12/15/2023

Reminders for Requesting Passes

- Requests MUST be dated 12/15/23 or onward
- Request either a “Sticker” or “Badge and Sticker” for batch 1
 - § Badge has no value on its own-each client needs a sticker
- ONLY request a “Badge and Sticker” if
 - § Enrolling a new client
 - § A continuing client has lost their badge
- Clients should be reusing their UPLIFT badges each quarter
- We can only fulfill a request for a client through one agency; duplicate requests need to be resolved by agency staff before being processed

UPLIFT UPDATES

Error Reminders

- We are continuing to track user errors-users lose UPLIFT access after 4 errors
- Common errors:
 - § No photo and/or Low quality photo
 - § Client's face obscured in photo (sunglasses, mask)
 - § Wrong quarter selected
 - § No ROI/Invalid ROI
 - § Under 18

POC Reminders

- Allocation surveys due Tuesday, 12/12/23
- Final Allocations will be sent Wednesday, 12/13/23
- Email UPLIFT@hhs.sccgov.org if the program coordinator at your agency changed

HMIS NEWSLETTER



Santa Clara HMIS News

November 2023

Welcome to the Santa Clara HMIS November 2023 newsletter!

In this edition you'll find the following:

- Check Out This Fun Poll: [Buttered popcorn, kettle corn, flavored popcorn - what's your fave?](#)
- LSA Updates
- [MyConnectSV Launch!](#)
- Report Spotlight - Understanding Move-In Dates
- Meeting/Upcoming Events/Upcoming Holiday
- Bitfocus is Hiring!



IN THE KNOW



LSA – Data Quality Outreach

LSA – Data Quality Outreach

What Can Your
Agency Do to Prepare
for LSA?

The System
Administration team
may reach out to verify
or correct data about
your program and/or
clients

Please look out for
those emails and
respond promptly

We truly appreciate the
hard work your
community does to
maintain data that is
complete, accurate,
and timely!



LSA – Data Quality Outreach



Run the [\[HUDX-225\] HMIS Data Quality Report](#)



Run the [\[GNRL-106\] Program Roster](#)



Run the [\[GNRL-220\] Program Details Report](#)



Review Bed Inventories and Utilization rates for accuracy. Ensure an accurate number of beds and units are listed throughout the year for your shelter and housing programs



Utilization rates should be between 90-105%



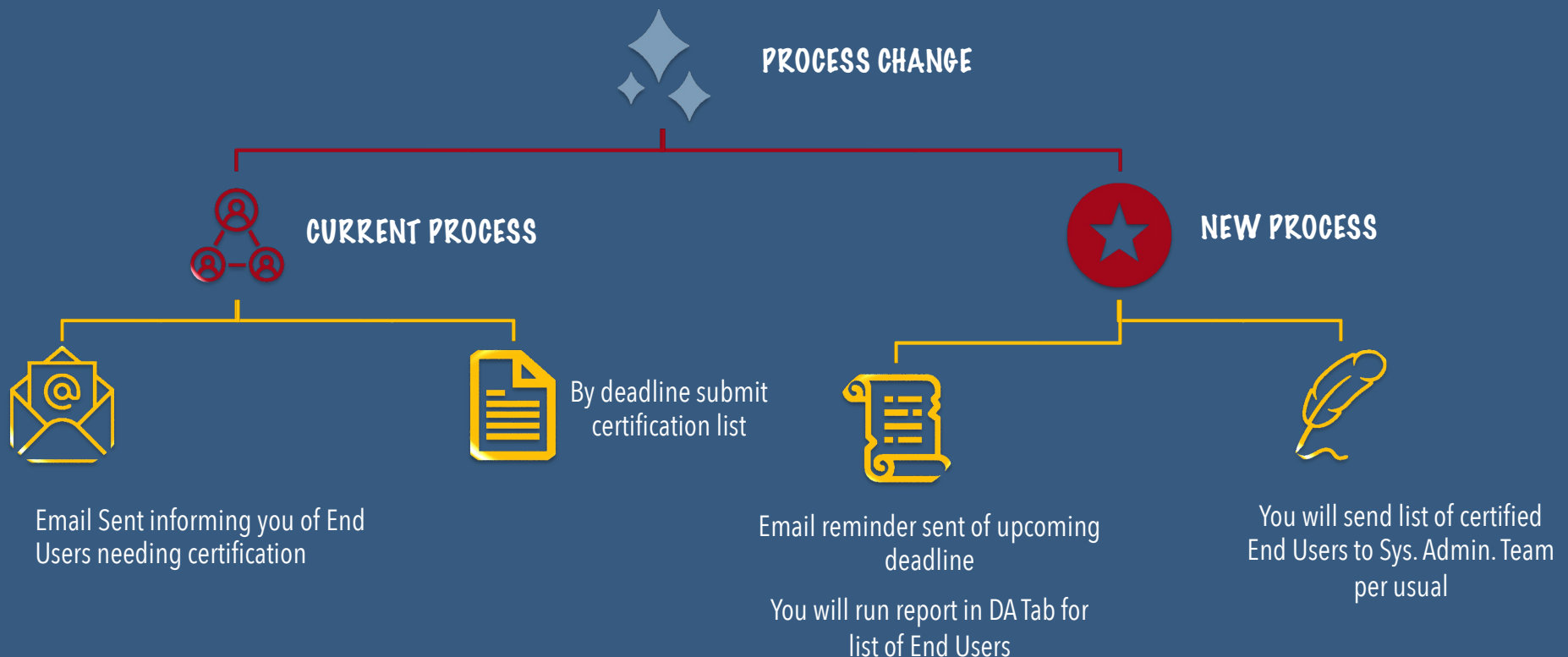
For Night-by-night (NbN) Shelters, please resolve any missing exits or abandoned enrollments

**LSA Final Deadline
for Submission:
Thursday, January
11th, 2024**

SCC HMIS Quarterly Compliance Checklist

Process Change

SCC HMIS Quarterly Compliance Checklist – *Process Change*



SCC HMIS Quarterly Compliance Checklist – *How to Guide*

Quarterly Security Checklist Report: How to Guide Steps

scc.bitfocus.com/forms-manuals

(408) 596-5866, EXT. 2 | SCCSUPPORT@BITFOCUS.COM | 🔍

Home About Us ▼ Training ▼ TA/Agency Lead Info ▼ Resources ▼ Forms and Manuals Contact ▼

Other Tools & References

- ✓ [Santa Clara County Community Queue Referrals - Standard Location Practices](#)
- ✓ [Domestic Violence, Sexual Assault, and Human Trafficking Pre-Screening Tool and Referral Guide](#)
- ✓ [How to Exit Clients from a Program](#)
- ✓ [How to Create an Anonymous Client Profile](#)
- ✓ [When a Client Requests a Name Change](#)
- ✓ [CCP Reports User Guide](#)
- ✓ [How To Fix Common Annual Assessment Errors](#)
- ✓ [SCC Helpful Reports Guide](#)
- ✓ [Victim Services Screening Tool and Training](#)
- ✓ [How to ask well-being questions in PSH Enrollment](#)
- ✓ [Quarterly Security Checklist Report: How to Guide](#)
- ✓ [CE Assessment Referral Errors: How to Guide](#)

SCC HMIS Quarterly Compliance Checklist – *How to Guide*

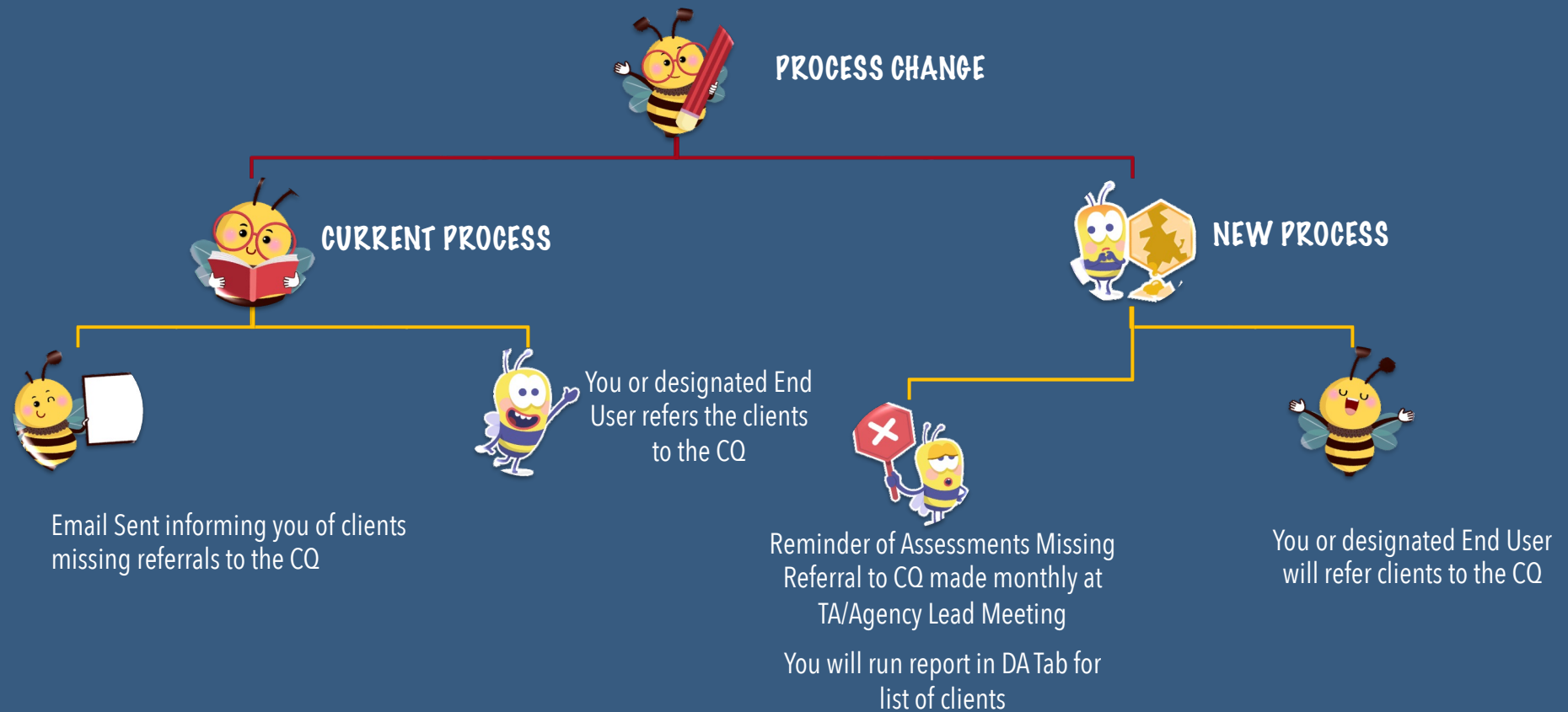
A woman with blonde hair is sitting at a desk in a dimly lit office at night. She is looking at a computer monitor which displays some data. The word "DEMONSTRATION" is overlaid on the image in white, underlined capital letters.

DEMONSTRATION

Coordinated Entry (CE) – Assessments Missing Referrals to the CQ

Process Change

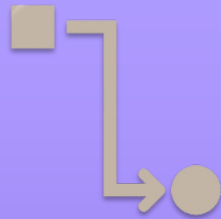
Coordinated Entry (CE) – Assessments Missing Referrals to CQ– *Process Change*



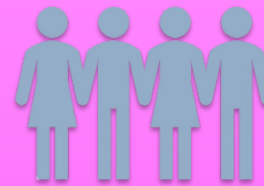
Importance of Referring Clients to CQ – **Why Refer?**



To ensure that the most vulnerable households experiencing homelessness do not miss out on **supportive housing opportunities**



Coordinated entry is a consistent, community-wide intake process to match people experiencing homelessness to existing community resources that are best fit for their situation – *this cannot happen if the assessment is not referred to the Community Housing Queue*



If the client is already on the Community Housing Queue, you'll see a note under the profile photo that reads

"Client has an active entry on the Community Queue: Community Housing Queue"



UNIQUE IDENTIFIER
BF1A7116B

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Emergency Shelter Queue - Households With Children

[VIEW DETAILS](#)

Client has an active entry on the Community Queue: Community Housing Queue

[VIEW DETAILS](#)

[No Contact Information Add](#)

PLEASE NOTE: There are several other queues a client may be on, so make sure the note under the photo reads exactly as above

Assessments Missing Referral to CQ – *By Agency*

Agency Name	#	Agency Name	#	Agency Name	#	Agency Name	#
LifeMoves	162	Family and Children Services	7	West Valley Community Services	2	Goodwill of Silicon Valley	1
HomeFirst	39	The United Effort Organization	6	Parisi House on the Hill	2	California Youth Outreach	1
PATH	33	UPLIFT	6	Community Services Agency of Mountain View	2	Razing the Bar	1
County: SCVHHS - Ambulatory	27	Mission Possible	4	Horizon Services, Inc - DBA Mission Street Sobering Center	2	VAPAHCS	1
County: Reentry Resource Center	18	Gardner Health Services	3	County: OSH	1	County: SCVHHS - BHSD - AOA - FDR	1
Santa Clara Family Health Plan (SCFHP)	16	Abode Services	3	County: SSA - Department of Family and Children's Services (DFCS)	1	Momentum for Health	1
Amigos de Guadalupe	16	WeHOPE	2	JobTrain	1	County: SCVHHS - BHSD - Whole Person Care (WPC)	1
Bill Wilson Center	15	County: SCVHHS - BHSD - AOA - CWS	2	New Directions - Peninsula Healthcare Connection	1	St. Andrew's Residential Programs for Youth (STAR)	1
Community Solutions	8	Midtown Family Services	2	Covenant House California	1	<i>Please run report in DA Tab and refer clients accordingly</i>	
Sunnyvale Community Services	7	County: SSA - DEBS SSI Advocacy	2	County: Public Defender Office	1		
South County Compassion Center (Compassion Center)	7	Move Mountain View	2	St. Joseph's Family Center	1		

Assessments Missing Referral to CQ – *How to Guide*

CE Assessment Referral Errors: How to Guide Steps

The screenshot displays the website scc.bitfocus.com/forms-manuals. The header includes contact information: (408) 596-5866, EXT. 2 and SCCSUPPORT@BITFOCUS.COM. The navigation menu features links for Home, About Us, Training, TA/Agency Lead Info, Resources, Forms and Manuals (highlighted with a red box), and Contact. Below the navigation bar, there is a link for Chinese Forms. The main content area is titled 'Other Tools & References' and lists several resources, each preceded by a checkmark icon. The last item in the list, 'CE Assessment Referral Errors: How to Guide', is highlighted with a red box.

✓ [Chinese Forms](#)

Other Tools & References

- ✓ [Santa Clara County Community Queue Referrals - Standard Location Practices](#)
- ✓ [Domestic Violence, Sexual Assault, and Human Trafficking Pre-Screening Tool and Referral Guide](#)
- ✓ [How to Exit Clients from a Program](#)
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- ✓ [CE Assessment Referral Errors: How to Guide](#)

Assessments Missing Referral to CQ – *How to Guide*

A person wearing a grey sweater is typing on a silver laptop keyboard. A white coffee cup is visible in the foreground. The background is a blurred desk with a pen and a notebook. The word "DEMONSTRATION" is overlaid in white text with a thin white underline.

DEMONSTRATION

Using DocuSign

Common DocuSign ROI Error

Invalid- initials typed in

DocuSign Envelope ID: 84DA6E0E-4ABA-4F0B-A1D1-1C9A5019B59







CLIENT CONSENT TO DATA COLLECTION AND ROI

AC	<ul style="list-style-type: none"> Mental health inform part of the standard mental health service Department
AC	<ul style="list-style-type: none"> Substance abuse tre questions asked as p client receiving subst Behavioral Health Se
AC	<ul style="list-style-type: none"> Financial and benefit verification, public a allotments, health ca information)
AC	<ul style="list-style-type: none"> Housing information
AC	<ul style="list-style-type: none"> Information about se date, duration, and t
N/A	<ul style="list-style-type: none"> Other (specify):

Valid - initials added by client through DocuSign

DocuSign Envelope ID: B9735EFF-7B03-420D-A30E-F2A7A4F7B911

CLIENT CONSENT TO DATA COLLECTION AND ROI

	<ul style="list-style-type: none"> Mental health inform part of the standard mental health service Department
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	<ul style="list-style-type: none"> Other (specify): _____

DEMONSTRATION

The screenshot displays the DocuSign eSignature dashboard. At the top, the navigation bar includes 'Home', 'Manage', 'Templates', 'Reports', and 'Settings'. On the right, it shows '26 Days Left', a 'View Plans' button, and a user profile icon 'AE'. The main section is titled 'Get started' with a progress bar indicating '3 / 6 Completed' and a 'Show me' button. Below this, a 'Welcome back' message is accompanied by a signature of 'Angela Evans' and a long alphanumeric string. To the right of the signature are four statistics: '0 Action Required', '1 Waiting for Others', '0 Expiring Soon', and '1 Completed'. A large dashed box in the center contains the text 'Drop documents to get started or click the 'Start' button.' with a blue 'Start' button. The 'Recent Activity' section at the bottom lists two items: 'Complete with DocuSign: Consent to Data Collection and ROI (V...' from 24 hours ago, and 'Here is your signed document: Consent to Data Collection and R...' from 6 days ago. The first item has a 'Resend' button, and the second item has a 'Download' button. A 'Go to Manage' link is also present.

DocuSign eSignature

Home Manage Templates Reports Settings

26 Days Left View Plans ? AE

Get started 3 / 6 Completed Show me

Welcome back Last 6 Months

Signed by: **AE** Angela Evans EC590C54C3454A8...

0 Action Required 1 Waiting for Others 0 Expiring Soon 1 Completed

Drop documents to get started or click the 'Start' button.

Start

Recent Activity ⓘ Go to Manage →

Complete with DocuSign: Consent to Data Collection and ROI (V... 24 hours ago

Waiting for sccupcomingeventscalendar@gmail.com

Resend

Here is your signed document: Consent to Data Collection and R... 6 days ago

Completed

Download



MEMOS

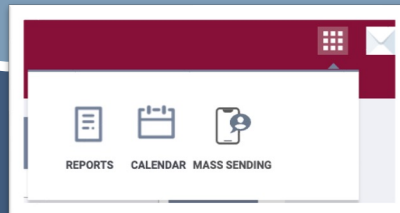
NEW MyConnectSV Feature

**New MyConnectSV Portal
Features will be released on
Monday, December 11!**

Preliminary release—test these
out and share your
feedback with us to continue
improving!

MASS MESSAGES & MASS REQUESTS

- Save time by sending messages or requests to multiple clients at one time
- Send requests based on clients with MyConnectSV accounts who are actively enrolled in program(s) at your agency, previously enrolled, or search for specific clients
- Accessible to all users with Portal training completed under the new Mass Sending option in the launch pad: [screenshot below]

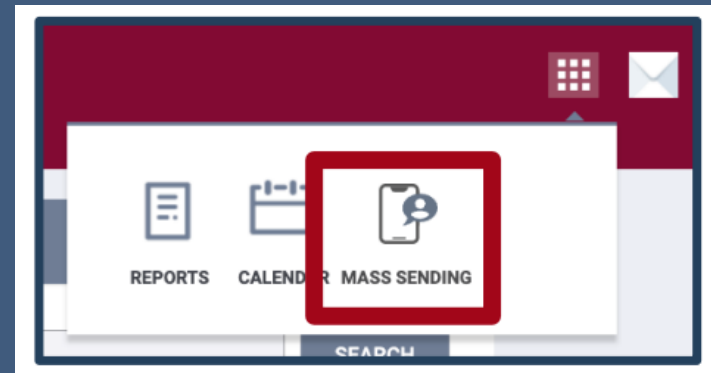


AUTOMATIC INVITATION REMINDERS

- Invitations sent to clients to create a MyConnectSV portal account will **now expire 14 days after being sent**
- Clients will now receive automatic reminder emails 6 days and 3 days before the invitation expires

NEW MyConnectSV Feature – Mass MyConnectSV Requests

MyConnectSV requests or messages to multiple clients at one time are managed through the Mass Sending functionality; which is accessed through the navigation pad

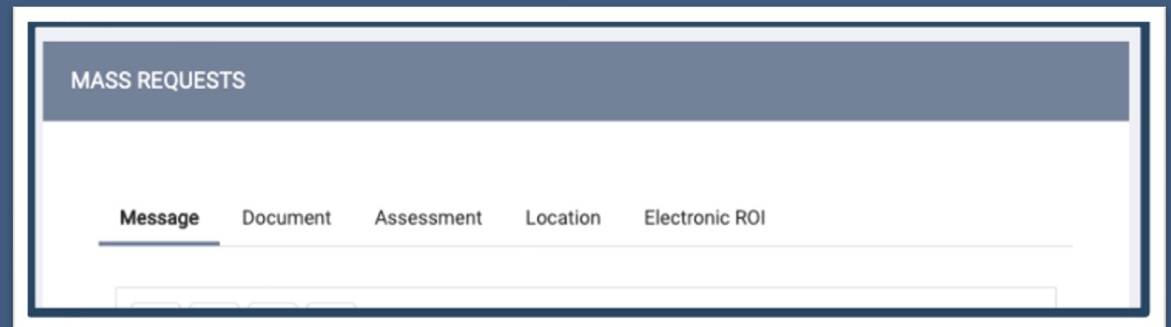


NEW MyConnectSV Feature

After clicking **Mass Sending**, choose either Message or the type of mass request you'd like to send

- Document
- Assessment
- Location
- Electronic (ROI)

Details on specific types of requests are included in the next section (Feature Review).



NEW MyConnectSV Feature

All clients with MyConnectSV are included in the Mass Message. Use the Search bar to expand or limit the number of Clients who receive your message.

Active

Community Shelter Program

SEARCH

<input type="checkbox"/>	Unique Identifier	Program	Start Date	End Date	Status	
<input type="checkbox"/>	8F425AD2A	Daniel Johnson	Community Shelter Program	01/24/2022	(not set)	Active

Clients who are Active in your programs

None

Without any enrollment (...)

SEARCH

Clients who are NOT Active in your programs

Jones

All

All selected

SEARCH

<input type="checkbox"/>	Unique Identifier	Program	Start Date	End Date	Status	
<input type="checkbox"/>	28F0D834C	Julian Jones	(not set)	(not set)	(not set)	None

Clients by name

NEW MyConnectSV Feature

Click the top toggle button to add all clients in the current list to the **Selected clients list** in the right pane, or add and remove individual clients by clicking the toggle next to their name

<input checked="" type="checkbox"/>	Unique Identifier		Program	Start Date	End Date	Status
<input checked="" type="checkbox"/>	6A10F37E7	Sandy Baker	Community Prevention Program	01/11/2022	(not set)	Active
<input checked="" type="checkbox"/>	63D31212D	Tish Roberts	Community Prevention Program	02/18/2022	03/06/2022	Inactive

Click **Preview Mass Request** in the right pane to review and send your message or request.

Selected clients list

PREVIEW MASS REQUEST

6A10F37E7

Sandy Baker

63D31212D

Tish Roberts

HOLIDAY SCHEDULE



Bitfocus
Closed

- Starting December 25th, 2023 – January 1st, 2024

Help Desk
Availability

- Skeleton Crew
- Limited Availability via Email
- Please submit requests, but be patient

Annual Confidential Client Consent Training - Updates

Santa Clara County Client Consent Training - 2023

Normally conducted during the beginning of the new year, this training has been moved to sometime in March 2024

Notifications will be provided in advance.



OBJECTIVES

To understand:

The legal & regulatory requirements for obtaining client consent

The terms of the HMIS Client Consent Form

The client consent rules & how they will be enforced

The client consent tools in the Clarity system



I NEVER INTENDED ON BECOMING A PIRATE,
HIGGINS, UNTIL THAT FATEFUL CHRISTMAS DAY
I SHOT MY EYE OUT WITH AN OFFICIAL
RED RYDER CARBINE ACTION TWO HUNDRED
SHOT RANGE MODEL AIR RIFLE...

Next Month's Meeting

Thursday, January 4, 2023